

LISTING OF CLAIMS

The following "Listing of Claims" replaces all prior versions and listings of claims in the application:

1. (Currently Amended) A computer-implemented method for creating a portfolio of issues comprising the steps of:

receiving ~~computer~~ user input via a computer identifying specific issues to be added to the portfolio;

receiving ~~computer~~ user input via a computer indicating a selection of one of a plurality of options for creating the portfolio;

receiving ~~computer~~ user input via a computer indicating a past date for purchase of the portfolio; and

creating the portfolio and calculating the portfolio's past performance, using a computer, based on said selection of one of said plurality of options and the past date.

2. (Currently Amended) The computer-implemented method according to claim 1, wherein said receiving ~~computer~~ user input indicating the selection includes receiving ~~computer~~ user input via a computer indicating a selection of an option to allocate a number of shares for each issue.

3. (Original) The computer-implemented method according to claim 2, wherein the number of shares is constant for each issue.

4. (Original) The computer-implemented method according to claim 2, wherein the number of shares is not constant for each issue.

5. (Original) The computer-implemented method according to claim 2, wherein the number of shares for each issue is based on a weighting factor.

6. (Currently Amended) The computer-implemented method according to claim 1, wherein said receiving ~~computer~~ user input indicating the selection includes receiving ~~computer~~

user input via a computer indicating a selection of an option to allocate an equal amount for the purchase of each issue and wherein said equal amount is ~~selectable~~ selected by a user.

7. (Currently Amended) The computer-implemented method according to claim 1, wherein said receiving ~~computer~~ user input indicating the selection includes receiving ~~computer~~ user input via a computer indicating a selection of an option to allocate a total amount for the portfolio.

8. (Original) The computer-implemented method according to claim 7, wherein said amount is equally divided between said issues.

9. (Original) The computer-implemented method according to claim 7, wherein said amount is not equally divided between said issues.

10. (Original) The computer-implemented method according to claim 7, wherein said amount is divided between said issues based on a weighting factor.

11. (Previously Amended) The computer-implemented method according to claim 1, wherein a historical purchase price for each specific issue in the portfolio is obtained, by the computer, from a historical database, based on the past date.

12-16. (Previously Canceled).

17. (Currently Amended) A computer-readable medium having a computer-executable program stored thereon for creating a portfolio of issues, said program comprising the steps of:

receiving identification of specific issues to be added to the portfolio from a user via a computer;

receiving a selection of one of a plurality of options for creating the portfolio from a user via a computer;

receiving input indicating a past date for purchase of the portfolio from a user via a computer; and

creating the portfolio and calculating the portfolio's past performance based on said selection of one of said plurality of options and the past date.

18. (Currently Amended) The computer-readable medium having said program according to claim 17, wherein said receiving the selection includes receiving a selection of an option to allocate a number of shares for each issue from a user via a computer.

19. (Original) The computer-readable medium having said program according to claim 18, wherein the number of shares is constant for each issue.

20. (Original) The computer-readable medium having said program according to claim 18, wherein the number of shares is not constant for each issue.

21. (Original) The computer-readable medium having said program according to claim 18, wherein the number of shares for each issue is based on a weighting factor.

22. (Currently Amended) The computer-readable medium having said program according to claim 17, wherein said receiving the selection includes receiving a selection of an option to allocate an equal amount for the purchase of each issue and wherein said equal amount is ~~selectable~~ selected by a user.

23. (Currently Amended) The computer-readable medium having said program according to claim 17, wherein said receiving the selection includes receiving a selection of an option to allocate a total amount for the portfolio from a user via a computer.

24. (Previously Amended) The computer-readable medium having said program according to claim 23, wherein said amount is equally divided between said issues.

25. (Previously Amended) The computer-readable medium having said program according to claim 23, wherein said amount is not equally divided between said issues.

26. (Previously Amended) The computer-readable medium having said program according to claim 23, wherein said amount is divided between said issues based on a weighting factor.

27. (Previously Amended) The computer-readable medium having said program according to claim 17, wherein a historical purchase price for each specific issue in the portfolio is obtained from a historical database, based on the past date.

28. (Currently Amended) A system for creating a portfolio of issues comprising:
an input system for receiving a designation of issues from a user, for receiving a designation of an option from a user for creating said portfolio selected from a plurality of options, and for receiving a historical price associated with each of said issues; and
a processor for determining the number of shares of said issues to add to said portfolio and past performance data relating to the portfolio based on said designated option and said historical price.

29. (Previously Canceled).

30. (Currently Amended) A computer-readable medium having a computer-executable program stored thereon for creating a portfolio of issues, said program comprising the steps of:
receiving identification of specific issues to be added to the portfolio from a user via a computer;
receiving identification of a past closing date for the issues from a user via a computer;
receiving historical prices for the specific issues based on the past closing date;
receiving a selection of a quantity of said specific issues from a user via a computer; and
creating the portfolio based on the specific issues, the selected quantity of the specific issues, and the historical prices.

31. (Currently Amended) The computer-readable medium according to claim 30, ~~wherein~~ said program further comprising the step of:
storing ~~step stores~~ said portfolio on a client computer.

32. (Currently Amended) The computer-readable medium according to claim 30, ~~wherein said~~ program further comprising the step of:

storing ~~step-stores~~ said portfolio on a server computer.

33. (Previously Amended) The computer-readable medium according to claim 30, said program further comprising the step of:

receiving other information regarding the specific issues.

34. (Currently Amended) A computer-implemented method for creating a portfolio of issues comprising the steps of:

receiving ~~computer~~ user input via a computer identifying specific issues to be added to the portfolio;

receiving ~~computer~~ user input via a computer identifying a past closing date for the issues;

receiving computer input including historical prices for the specific issues based on the past closing date;

receiving ~~computer~~ user input via a computer indicating a selection of a quantity of said specific issues; and

creating the portfolio, using a computer, based on the specific issues, the selected quantity of the specific issues, and the historical prices.

35. (Currently Amended) The computer-implemented method according to claim 34, ~~wherein said~~ further comprising the step of:

storing ~~step-stores~~ said portfolio on a client computer.

36. (Currently Amended) The computer-implemented method according to claim 34, ~~wherein said~~ further comprising the step of:

storing ~~step-stores~~ said portfolio on a server computer.

37. (Previously Amended) The computer-implemented method according to claim 34, further comprising the step of:

receiving other information regarding the specific issues.

38. (Currently Amended) A computer-implemented method for creating a portfolio of issues comprising the steps of:

receiving ~~computer~~ user input via a computer identifying specific issues to be added to the portfolio;

receiving ~~computer~~ user input via a computer indicating a selection of one of a plurality of options for creating the portfolio; and

creating the portfolio, using the computer, based on said specific issues and said selection of one of said plurality of options.

39. (Currently Amended) The computer-implemented method according to claim 38, wherein said receiving ~~computer~~ user input indicating the selection includes receiving ~~computer~~ user input via a computer indicating a selection of an option to allocate a number of shares for each issue.

40. (Currently Amended) The computer-implemented method according to claim 38, wherein said receiving ~~computer~~ user input indicating the selection includes receiving ~~computer~~ user input via a computer indicating a selection of an option to allocate an equal amount for the purchase of each issue and wherein said equal amount is ~~selectable~~ selected by a user.

41. (Currently Amended) The computer-implemented method according to claim 38, wherein said receiving ~~computer~~ user input indicating the selection includes receiving ~~computer~~ user input via a computer indicating a selection of an option to allocate a total amount for the portfolio.

42. (Previously Added) The computer-implemented method according to claim 38, further comprising automatically retrieving current issue price information relating to the specific issues, using the computer, wherein said creating the portfolio further is based on said retrieved current issue price information.

43. (Currently Amended) A computer-readable medium having a computer-executable program stored thereon for creating a portfolio of issues, said program comprising the steps of:

receiving identification of specific issues to be added to the portfolio from a user via a computer;

receiving a selection of one of a plurality of options for creating the portfolio from a user via a computer; and

creating the portfolio based on said specific issues and said selection of one of said plurality of options.

44. (Currently Amended) The computer-readable medium having said program according to claim 43, wherein said receiving the selection includes receiving a selection of an option to allocate a number of shares for each issue from a user via a computer.

45. (Currently Amended) The computer-readable medium having said program according to claim 43, wherein said receiving the selection includes receiving a selection of an option to allocate an equal amount for the purchase of each issue and wherein said equal amount is ~~selectable~~ selected by a user.

46. (Currently Amended) The computer-readable medium having said program according to claim 43, wherein said receiving the selection includes receiving a selection of an option to allocate a total amount for the portfolio from a user via a computer.

47. (Previously Added) The computer-readable medium having said program according to claim 43, wherein said program further includes the step of retrieving current issue price information relating to the specific issues, wherein said creating the portfolio further is based on said retrieved current issue price information.

48. (Currently Amended) A system for creating a portfolio of issues comprising:
an input system for receiving a designation of issues from a user and for receiving a designation of an option from a user for creating said portfolio selected from a plurality of options; and

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a processor for automatically retrieving a price associated with each of said issues and for determining the number of shares of said issues to add to said portfolio based on said designated option and said price.